

SAMPLE

Performance and Development Plan

SAMPLE**Purpose of Appraisal:**

- ☒ Annual Review
☐ Trial Service Review
☐ Probationary Review
☐ Other:

Employee's Name: (Last, First, MI)

Miller, Todd

Agency:

General Administration

Position Title:

Custodian

Organizational Unit:

Campus Facilities Operations

Identification Number:**Evaluator's Name:**

Bill Thompson

Performance Period: From July 2004 To June 2005**Position Description Updated:** ☒**Date of Preview Session:** July 6, 2005**Position Linkage with Organizational Mission and Strategic Plan:**

What is the organization's mission, and how do the duties and responsibilities of this position link or contribute to the achievement of the mission, goals, and objectives of the organization? Provide brief summary.

General Administration exists to provide a variety of centralized administrative services to state agencies, including the maintenance of state office buildings and grounds. General Administration's mission is to help its customers succeed.

This position contributes to the mission of GA by maintaining proper cleanliness of client agency office space - helping them to create a professional environment.

Part 1: Performance Expectations

Based on the position's major responsibilities, outline the key results and competencies expected of the employee during this performance period. Limit the list to those that are key.

Key Results Expected

What are the most important objectives, outcomes, and/or special assignments to accomplish in order to be successful during this time period?

Ensure that all cleaning tasks are effectively performed for assigned offices, conference rooms, restrooms and other spaces per the documented cleaning rotation schedule. Reduce the number of client complaints regarding facility cleanliness by 20%.

1. Ensure that all maintenance tasks are effectively performed for assigned offices, conference rooms, restrooms and other spaces in a timely manner. This includes items on the scheduled maintenance list, additional items noted for maintenance by your supervisor, and routine day-to-day items that you note while conducting your job. This includes, but is not limited to: repairing or replacing fixtures, small painting projects, and replacement of burned out light bulbs. Reduce the number of client complaints regarding these types of maintenance issues by 20%.

2. Help ensure the security and energy efficiency of the facilities you are responsible for. Take responsibility to ensure doors are locked, windows are closed and locked, lights are turned off, etc.

3. Take responsibility to monitor the facilities assigned to you for additional cleaning and maintenance needs. Report any significant needs to your supervisor (anything that would require additional resources to remedy) or complete the work as appropriate.

Key Competencies Expected

What are the most important competencies that the employee should demonstrate in order to be successful?

1. Physical Ability - Is able to do sustained physical work, including working from a stepladder
2. Accountability - Accepts personal responsibility for the quality and timeliness of his work. Believes that the results achieved directly result from his personal decisions and actions. Acknowledges and corrects mistakes. Doesn't make excuses for errors or problems.
3. Interpersonal Skills - Interacts with co-workers, clients and others in a positive manner. Practices active listening. Is open and honest. Treats others with respect, kindness and consideration.
4. Productivity - Produces quality, desired results in an efficient (input per output) manner. Manages resources efficiently.
5. Safety - Performs work in a safe manner at all times. Assesses the work site for hazards. Maintains an organized work area. Identifies and corrects unsafe situations. Seeks guidance from supervisor and safety coordinator if needed. Attends and actively participates in safety training events. Considers the safety of other employees on the job site.

Part 2: Training & Development Needs/Opportunities

What training and development needs and opportunities should the employee focus on during this performance period?

Participate in the short-term workgroup being formed to revise the cleaning and maintenance rotation schedule. This group will start meeting in August and should be done by no later than the end of September.

Attend the following DOP training classes: Interpersonal Conflict Management and Basic Principles for a Collaborative Workplace. Meet with me within one week following each course to discuss what you learned and what you might apply to your job.

Part 3: Organizational Support

Part 3 is optional and to be completed only by the employee, at the beginning of the performance period.

What suggestions do you have as to how your supervisor, co-workers, and/or agency management can better support you in your present job and future career goals?

I have no input.

Acknowledgement of Performance Plan

The signatures below indicate that the supervisor and employee have discussed the performance expectations, and training and development needs outlined at the beginning of the performance period.

Evaluator's Signature Bill Thompson
20, 2004

Date June

Employee's Signature Todd Miller
2004

Date June 20,

Part 4: Interim Reviews (Optional)

Part 4 is an optional section that may be used during the course of the performance period to adjust performance expectations if circumstances change, and/or to document interim feedback sessions.

January 2004 Mid-Period Update: Mr. Miller has attended "Interpersonal Conflict Management" at DOP and we talked about how he could apply what he learned to his job. He identified one technique in particular he wanted to try to help him better deal with co-worker conflict. He and I agreed that he should use this technique when he felt he was in a conflict situation. We will meet in mid-February to discuss how the technique worked for him.

Part 5: Performance Feedback

Provide a narrative assessment of the employee's performance in relation to the Key Results and Competencies Expected that were outlined in Part 1. The assessment must be based on performance observed or verified.

Key Results Assessment

To what degree did the employee accomplish the expected results and how well were they done?

1. During the evaluation period, Mr. Miller met all expectations for facility cleanliness. He consistently completed all cleaning duties per the rotation schedule. I conducted several spot checks during the evaluation period and found the overall quality of his work to be good. The number of complaints from his assigned customers regarding facility cleanliness dropped by 30% during the evaluation period. I informally surveyed a number of Mr. Miller's customers and received very positive feedback. Several clients said they believed their facilities were receiving a more thorough cleaning than they had in the past.
2. During the evaluation period, Mr. Miller met all expectations for facility maintenance. He completed all items per the scheduled maintenance list and completed additional maintenance tasks I assigned to him in a timely manner. In my spot checks, I found a small number of minor maintenance items that he had not dealt with in the regular conduct of his job. The number of complaints regarding facility maintenance from his assigned customers dropped by 10% during the evaluation period. In my informal survey of some of Mr. Miller's clients, I heard no major complaints regarding facility maintenance, but also did not hear that they had seen improvements.
3. I was made aware of just one instance of a door left unlocked by Mr. Miller during this period. I believe that he takes extra care to ensure that the facilities he is responsible for are secure when he leaves them. Several customers commented that Mr. Miller is especially vigilant about making sure lights are turned off, and appreciated that he did a thorough check to see if anyone was still in the room before doing so.
4. Based on my surveys and spot checks, I believe Mr. Miller is doing a good job paying attention to extra cleaning needs in his assigned facilities, and an adequate job paying attention to the extra maintenance needs. Several times during the evaluation period, he reported to me some cleaning or maintenance needs that required additional resources to address.

Key Competencies Assessment

How well (or how frequently) did the employee demonstrate the behaviors, skills, and knowledge expected?

1. Physical Ability - Mr. Miller demonstrates that he can perform the physical requirements of the job.
2. Accountability - Mr. Miller appears to take pride in his work and to accept responsibility for the quality of his services. As noted in part 6A above, he consistently completed duties assigned to him. When I talked with him about missing a few smaller maintenance issues, he didn't offer excuses and vowed to make sure it didn't happen again.
3. Interpersonal Skills - At the beginning of the evaluation period, there were two incidents of conflict between Mr. Miller and two separate co-workers. Based on my review of these incidents, they appear to have started with Mr. Miller's tendency to keep to himself and his pattern of not responding in a positive manner when co-workers greet him. While I don't expect everyone to be friends and out-going, I do expect a basic level of respect and courtesy toward each other. Mr. Miller attended two DOP classes during the evaluation period and we discussed applying some of the techniques he learned. He has done so, and I have noted an improvement in his interactions with co-workers. One of the co-workers he had a conflict with told me they thought their relationship with Mr. Miller had improved.
4. Productivity - As noted in section 6A, Mr. Miller regularly completes his work on schedule and is meeting quality

expectations. His clients have commented on how hard he works. I have observed him using some very efficient methods to complete his work, including his process for cleaning restrooms. At our April staff meeting, I shared my observations regarding his restroom cleaning process with the team and asked them to use similar steps.

5. Safety - I have not observed Mr. Miller completing his work in an unsafe manner, nor did others report any such observations to me. There were no safety violations or issues reported for Mr. Miller during this period.

Other Relevant Information: (optional)

Comments and Signatures

This report is based on my best judgment.

Evaluator's Signature Bill Thompson

Date August 1, 2005

This report has been discussed with me.

Employee's Signature Todd Miller

Date August 2, 2005

Comments:

I have reviewed this report and, in my judgment, the process has been properly followed. In addition, the following comments are offered concerning the employee's performance.

Reviewer's Signature Susan Jackson

Title Operations Manager

Date August 4, 2005

Comments:

NOTE: Once the performance evaluation is completed and signed by all parties, it is the Evaluator's responsibility to provide a copy to the employee and to ensure that the original is placed in the employee's personnel file.